Virtual Appointments & Enrollment – Job Aid

UnitedHealthcare knows this is a challenging time for everyone. As a **Partner in Care**, we want to ensure you have ways to continue to serve your members and grow your business in a time of "social distancing." Use this job aid to help you conduct a one on one appointment virtually.

Requirements For Telephonic Appointment/Enrollment

- ✓ Permission to Contact (PTC) if you are calling the consumer
- ✓ Consumer must have a valid email address to use DocuSign
- ✓ If not on the PTC, you must obtain permission to email

During The Call

e.g. "Mrs. Jones, this is Jim with UnitedHealthcare. Thank you for taking the time to talk with me today about your health care needs."

1. **Introduce and state purpose of call**
2. **Obtain Scope of Appointment**
3. **Email Clarity and Enrollment Guides**
4. **Ask open ended questions to uncover and agree on needs**
5. **Use Clarity Workbook to answer any general Medicare questions**
6. **Present the plan(s) using Summary of Benefits section of the Enrollment Guide**
7. **Close the sale:**
   - **Enroll via LEAN**
   - **Complete the Health Assessment**
   - **Communicate next steps**

Available on the National Training Calendar

Steps to Sales Success | LEAN |Six Key Enrollment Conversations
Building Your Business Plan | Building Loyalty After the Sale

Available On-Demand via Jarvis

LEAN | Remote Signature | Electronic Scope of Appointment

Virtual Appointments & Enrollment– FAQ

See below for questions related to conducting a plan presentation and enrollment virtually. Please note our guidance may evolve with changes to the recommendations from local, state, and federal officials.

Does PTC cover email?

A consumer must give explicit permission to receive email. If the consumer has only given permission to call, the agent may call and obtain permission to contact via email.

What if the consumer does not have access to the internet?

Scope of Appointment and Enrollment forms can be sent via mail for signature.

In the event that using mail does not meet the desired effective date, agents may use the following process for consumers without internet access:

1. Following your needs analysis conversation, direct the consumer to call 855-572-3837. Inform your consumer that the representative will repeat some of the questions in order to meet all compliance requirements.
2. Email agentoversightadmin@uhc.com to indicate your consumer was unable to electronically sign documents and completed the application telephonically instead. Include name of prospect, date of presentation/referral to telesales, agent name, and writing ID. This will help ensure your commission payment and Agent of Record status.

Where can I find the Clarity Workbook?

You can download a version of the Clarity Workbook as a PDF from the UnitedHealthcare® Toolkit.

What if my consumer needs more details about DSNP eligibility and plan offerings?

Download the DSNP Consumer Guidebook from the UnitedHealthcare® Toolkit.

Where can I find the Enrollment Guide?

Enrollment Guides can be downloaded from the Sales Material Portal.

How else can I connect with housebound members?

The UnitedHealthcare Toolkit has a variety of marketing materials that can be both personalized and downloaded for digital use to help you stay engaged with your members all year long.